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Contract

Scottish Enterprise Pension Advice

Scottish Enterprise

F03: Contract award notice

Notice identifier: 2022/S 000-021035

Procurement identifier (OCID): ocds-h6vhtk-03140e

Published 2 August 2022, 9:16am

Section I: Contracting authority

I.1) Name and addresses

Scottish Enterprise

Atrium Court, 50 Waterloo Street

Glasgow

G2 6HQ

Contact

Joanne Napier

Email

joanne.napier@scotent.co.uk

Telephone

+44 1414686024

Country

United Kingdom

NUTS code

UKM82 - Glasgow City

Internet address(es)

Main address

<http://www.scottish-enterprise.com/>

Buyer's address

https://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA00398

I.2) Information about joint procurement

The contract is awarded by a central purchasing body

I.4) Type of the contracting authority

Regional or local Agency/Office

I.5) Main activity

Economic and financial affairs

Section II: Object

II.1) Scope of the procurement

II.1.1) Title

Scottish Enterprise Pension Advice

Reference number

P22-0010

II.1.2) Main CPV code

- 66520000 - Pension services

II.1.3) Type of contract

Services

II.1.4) Short description

Scottish Enterprise (SE) would like to invite tenders for the provision of accounting advice, actuarial advice and pension and benefits advice to the organisation which is independent of the Trustees' adviser, for a period of 5 years from 1st August 2022 to 31st July 2027.

The Scottish Enterprise Pension and Life Assurance Scheme (SEPLAS) "the scheme", has its own actuaries and advisers in place.

The tender will be carried out through the Open process

II.1.6) Information about lots

This contract is divided into lots: No

II.1.7) Total value of the procurement (excluding VAT)

Value excluding VAT: £305,000

II.2) Description

II.2.2) Additional CPV code(s)

- 66520000 - Pension services
- 66500000 - Insurance and pension services

II.2.3) Place of performance

NUTS codes

- UKM - Scotland

II.2.4) Description of the procurement

Scottish Enterprise (SE) would like to invite tenders for the provision of accounting advice, actuarial advice and pension and benefits advice to the organisation which is independent of the Trustees' adviser (The SE Pension and Life Assurance Scheme (the Scheme) has its own Actuaries' and Advisers) for the period from 1st August 2022 to 31st July 2027.

We intend to appoint a single supplier to provide this service.

Scottish Enterprise will require the following services within the the scope of this contract:

- Accounting advice and information
- Pension and benefits support
- Actuarial advice
- Staff communications

There will also be a degree of ad hoc work required, however the level of this cannot be determined or guaranteed.

We plan to put a contract in place for a total of five years due to the timings of the next two 3-yearly valuations which will take place under this contract.

II.2.5) Award criteria

Quality criterion - Name: Project Team Structure / Weighting: 30

Quality criterion - Name: Methodology / Weighting: 30

Quality criterion - Name: Understanding the project requirements / Weighting: 20

Quality criterion - Name: Information Security / Weighting: 10

Quality criterion - Name: Business Continuity / Weighting: 5

Quality criterion - Name: Fair Work First / Weighting: 5

Price - Weighting: 40

II.2.11) Information about options

Options: No

II.2.13) Information about European Union Funds

The procurement is related to a project and/or programme financed by European Union funds: No

II.2.14) Additional information

See attached ITT for full details

Section IV. Procedure

IV.1) Description

IV.1.1) Type of procedure

Open procedure

IV.1.8) Information about the Government Procurement Agreement (GPA)

The procurement is covered by the Government Procurement Agreement: Yes

IV.2) Administrative information

IV.2.1) Previous publication concerning this procedure

Notice number: [2022/S 000-003443](#)

Section V. Award of contract

Contract No

P22-0010

A contract/lot is awarded: Yes

V.2) Award of contract

V.2.1) Date of conclusion of the contract

15 June 2022

V.2.2) Information about tenders

Number of tenders received: 8

Number of tenders received from SMEs: 1

Number of tenders received from tenderers from other EU Member States: 0

Number of tenders received from tenderers from non-EU Member States: 8

Number of tenders received by electronic means: 8

The contract has been awarded to a group of economic operators: No

V.2.3) Name and address of the contractor

Isio

Isio c/o SPS, PO Box 721

Salford

M5 0QT

Telephone

+44 7881510716

Country

United Kingdom

NUTS code

- UK - United Kingdom

The contractor is an SME

No

V.2.4) Information on value of contract/lot (excluding VAT)

Total value of the contract/lot: £305,000

Section VI. Complementary information

VI.3) Additional information

02/08/2022 - THIS IS A NOTICE OF CONTRACT AWARD

SPD Statement for 2A.17 – Form of Participation (Notably as part of a group, consortium, joint venture or similar).

Any contract will be entered into with the nominated lead organisation and all members of the consortium, who will in these circumstances each be required to execute said contract together with all ancillary documentation, evidencing their joint and several liability in respect of the obligations and liabilities of the contract. It will be for members of the consortium to sort out their respective duties and liabilities amongst each other. For

administrative purposes, any associated documentation will be sent to the nominated lead organisation.

SPD Statement for 2C.1 - Where the main bidder relies on the capacities of other entities in order to meet the selection criteria, the bidder must provide a separate SPD response setting out the information required under SPD (Scotland): Part II (sections A and B); Part III exclusion grounds; the relevant part of Section IV selection criteria; and Part V (if applicable) for each of the entities concerned.

SPD Statement for 2D.1.2 – If the bidder proposes to subcontract any part(s) of the service and those sub-contractors are not relied upon, they should arrange for a separate SPD response from each potential subcontractor. The subcontractors must complete the relevant parts of the SPD (Scotland) (Sections A and B of Part II and Part III only) to self-declare whether there are grounds for their exclusion. This may be requested at the selection stage or prior to the subcontractor commencing work on the contract.

(SC Ref:701996)

VI.4) Procedures for review

VI.4.1) Review body

Glasgow Sheriff Court and Justice of the Peace Court

Sheriff Clerk's Office, PO Box 23, 1 Carlton Place,

Glasgow

G5 9DA

Telephone

+44 1414298888

Country

United Kingdom

Internet address

<https://www.scotcourts.gov.uk/the-courts/court-locations/glasgow-sheriff-court-and-justice-of-the-peace-court>

VI.4.2) Body responsible for mediation procedures

Scottish Government

5 Atlantic Quay, 150 Broomielaw

Glasgow

G2 8LU

Email

SPOEprocurement@scotland.gsi.gov.uk

Telephone

+44 1412425466

Country

United Kingdom

Internet address

<http://www.gov.scot/Topics/Government/Procurement/Selling/supplier-enquiries>

VI.4.3) Review procedure

Precise information on deadline(s) for review procedures

In the first instance, contact the Head of Facilities Management and Procurement at Scottish Enterprise, with any concerns or enquiries. Email: <https://www.scottish->

[enterprise.com/help/contact-us.](http://enterprise.com/help/contact-us)

An economic operator that suffers, or risks suffering, loss or damage attributable to a breach of duty under the Public Contracts (Scotland) Regulations 2015, may bring proceedings that will be started in the High Court.

VI.4.4) Service from which information about the review procedure may be obtained

Scottish Government

5 Atlantic Quay, 150 Broomielaw

Glasgow

G2 8LU

Email

SPOEprocurement@scotland.gsi.gov.uk

Telephone

+44 1412425466

Country

United Kingdom

Internet address

<http://www.gov.scot/Topics/Government/Procurement/Selling/supplier-enquiries>